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3 September 1965

MEMORANDUM FOR: Economic Intelligence Committee

SUBJECT:

Annual Report of the EIC Subcommittee on Minerals

and Metals for FY 1965

A. Activities of the Subcommittee During Fiscal Year 1965

1. Review of the Intelligence Product in the Subcommittee's Field of Competence

During FY 1965 no meetings of the Subcommittee were held. However, there was a significant amount of informal communication and coordination between committee members and between other representatives of the participating agencies on problems in the minerals and metals field.

2. Research and Collection Deficiencies

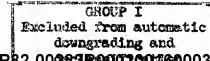
The Subcommittee again notes the scarcity of information on the minerals and metals industry in Communist China, in particular information which would explain the decline in Chinese exports of tin, antimony, and tungsten.

3. Review of Substantive Papers

The Subcommittee did not review any substantive papers during FY 1965. However, review and coordination of estimates continued on a bilateral basis, in particular between the US Bureau of Mines and CIA regarding production of gold in the USSR.

4. Review of Proposals for External Research

None



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5. Maintenance of Agreed Basic Statistics

The 1965 issue of the Moonomic Intelligence Statistical Handbook contains CIA estimates of Communist World production of the following minerals and metals:

Metallurgical coke
Crude steel
Pig iron and blast-furnace
ferroalloys
Rolled steel
Iron ore
Manganese cre
Refined nickel
Chromite
Molybdenum
Cobalt
Tungsten ore

Refined copper
Primary aluminum
Bauxite
Smelter production of lead
Refined zinc
Smelter production of primary
tin metal
Primary magnesium
Titanium sponge metal
Gald (Soviet production and holdings,
Metallurgical equipment

Subcommittee members have been asked to review these estimates upon receipt of the Handbook.

6. Projects Undertaken at the Request of the EIC or Proposed to the EIC

Mone

7. Intelligence Research Techniques

Nothing to report

8 Special Coordination Furctions of the Substantittee

None

9. Evaluation of the Role of the Subcommittee

The Department of Bulerse has recommented that a number of EDG Subcommittees, including the Mo erals and Metals Subcommittee, be abolished on the grounds that meetings are infrequent and other means are available for effecting coordination within the Intelligence Community. The Subcommittee concurs in this recommendation.

B. Future Program of the Suber comittee

Movertain

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Special Assistant, Research and Reports

15 June 1965

THRU : Chief, Economic Research Area

TARE : Chief, Resources and Industries Division

Chief, Minerals and Metals Branch

MIC Subcommittee on Minerals and Metals

- 1. I understand DOD has recommended that the Minerals and Metals Subcommittee be abolished on the grounds that meetings are infrequent and other means are available for effecting coordination, within the Community, of intelligence estimates on the minerals and metals industries in Communist countries.
- 2. The Minerals and Metals Subcommittee has not met since October 1960 because no need has arisen for multilateral discussion or coordination. The only other agency in the US Government publishing estimates on minerals and metals in Communist countries is the Bureau of Mines and our efforts to get the Bureau to accept our estimates of Soviet gold production have been carried on bilaterally outside the EIC Structure.
- 3. In our dealings with other agencies we are, for the most part, the producers and they are the consumers, and again it is a bilateral contact. We provide regular support to various units in State and Commerce and occasional support to DOD and other agencies.
- 4. The abelition of the Subcommittee would in no way hamper our activities and I think the DOD recommendation should be adopted.

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